



User Manual

EMPLOYEE TRAINING CENTER

This website is a centralized training and development site for university faculty and staff.

The Employee Training Center (ETC) is the portal that houses the employee Learning Management System (ELMS) for training that will allow users to register and complete training. The CSUSM ETC supports staff and faculty to view and register assigned training classes, as well as monitoring their training and development history. The ELMS will assist CSUSM employees by advancing their knowledge through training and development courses.

The ETC will allow CSUSM faculty and staff to:

- Track your completed and enrolled trainings as well as review upcoming training opportunities
- Register for instructor led training
- Enroll and launch web based training
- Complete self-administered trainings

Resources:

- [Frequently Asked Questions](#)
- [Technical Tips](#)
- [User Guide](#)
- [ETC Brochure](#)

Contents

Introduction to ETC:.....	3
Dashboard Overview:	3
Left Plane:	3
Center Plane:	3
Key Terms:	4
My Menu:	4
LearnerWeb Icons:.....	5
Requirements and Tips	6
Disable Pop-up blockers	6
Running JavaScript.....	6
Updating JavaScript	7
How to Log In to ETC:	10
How to launch a course from your Learning Track	11
Manager Menu:.....	12
How to Run a Report:.....	13
Edit an existing Report:.....	14
Example on how to pull a Report:	15
Create a Flexi-group:.....	17
Creating a Learning Track:	19
Add Course(s) to Learning Track:.....	21
Add Learners to a Learning Track Automatically Using	24
Add Learners to a Learning Track Manually:	25
Removing a Learning Track from a Learner:.....	28
Removing Course from Learner:	29
Master Schedule:	30
Use the Master Schedule to add courses to the calendar:.....	31

Introduction to ETC:

Your ETC (Employee Training Center) provides the ability to deliver, manage, track, and market learning content. All of your learning needs, whether online, instructor led, or outside of the organization, can be coordinated in one easy to use location keeping you up to date and on target. Additionally, you can manage compliance requirements; keep up to date on certifications, run reports, and more. ETC is highly configurable allowing you to create the learning system you need with the look and feel you want.

Dashboard Overview:

The home screen is referred to as the dashboard. You may access the dashboard by clicking on 'My Dashboard'. The dashboard is visually divided up into two sections: the left and center pane.

The screenshot shows the California State University San Marcos ETC dashboard. The header includes the university logo and name, and links for 'FAQ' and 'Log out'. The left navigation pane has two sections: 'My Menu' (containing links like My Dashboard, My Transcript, My Enrollments, My Requirements, Course Catalog, Schedule, Contact Information, Log Out) and 'Manager Menu' (containing links like People, Manager To-Do List, Reports, Courses, Master Schedule, Catalog Manager, Communication Manager, Administration, Configuration). The center pane displays three main sections: 'My Learning Tracks' (a table with columns: Track, Assigned, Completed, Status, Certificate), 'Current Enrollments' (a table with columns: Delivery, Course Title, Status, Status Date, Action, Cancel), and 'Completed Training (last 5 or less)' (a table with columns: Course Title, Status, Status Date, Action, Certificate). The 'Current Enrollments' table shows one course: 'On-Line courses' with 'Captivate E-Learning Course' in progress, status date 07/12/2013, and a 'Launch' button. The 'Completed Training' table shows one course: 'CSU Conflicts of Interest' finished on 11/15/2013, with a 'Retake' button and links for 'print', 'Email', and 'PDF'.

Left Plane:

Within the navigation bar on the left hand side of the page there are two menus: My Menu & Manager Menu

- **My Menu:** All learners will see this on their dashboard. This contains links that all learners have access to. The links in this area will allow the learner to navigate through the Employee Training Center.
- **Manager Menu:** Managers Menu provides navigation to all of the managers, system administrator needs within LearnerWeb. Only people with certain access levels will see this menu on their dashboard.

Center Plane:

The center pane gives the learner a quick snapshot of their training. It consists of three sections: My Learning Track, My Current Enrollments and Completed Training.

- **MyLearningTracks:** This section contains a listing of all the learning tracks that you (person who is signed in) are responsible for completing. Some people may not have any. This depends on job requirements and supervisor preferences.
- **My Current Enrollments:** This is a snapshot of what classes you are currently enrolled in. This is not a complete list of all the classes that you are currently enrolled in. For a complete list you will need to click on the My Enrollments link in the My Menu bar.
- **Completed Training:** This is a snapshot of the last 5 classes completed. For a full list of your completed training you can click on the My Reports link and run a Transcript of completed training

Key Terms:

- **Course Catalog:** Click on the yellow folder icon  to open a catalog. You can see additional information about the course by clicking the title.
- **Course:** This is the description of the class
- **My Learning Track:** These are the courses assigned specifically to you. The list includes courses you have completed and courses that still need you to take actions, such as launch, to complete.
- **Days Valid:** This is the amount of time that the class is available for (set by the instructor or department's Preferences)
- **Employee Training Center:** This is the name of the website that hosts training and training activities
- **Event:** This is an occurrence/instance of the course
- **LearnerWeb:** This is the name of the software that the Employee Training Center uses
- **Location:** This refers to the name of the building (Example: Academic Hall)
- **Manager:** This is the MPP of a department on campus.
- **Security Profile:** This is the access that you have within the Employee Training Center system.
- **Venue:** This is the room location of the training (Example: Room. 204)

My Menu:

All learners will see this on their dashboard. Links in this area will allow the learner to navigate through the Employee Training Center.


California State University
SAN MARCOS

Welcome Learnerweb Administrator

My Menu

- [My Dashboard](#)
- [My Transcript](#)
- [My Enrollments](#)
- [My Requirements](#)
- [Course Catalog](#)
- [Schedule](#)
- [Contact Information](#)
- [Log Out](#)

▼ My Learning Tracks

Track	Assigned	Completed	Status	Certificate
CSUSM Ethics (COI) Training	11/18/2013		Incomplete	

Current Enrollments

▶ Show SQL

You currently are not enrolled in any training.

▼ Completed Training (last 5 or less)

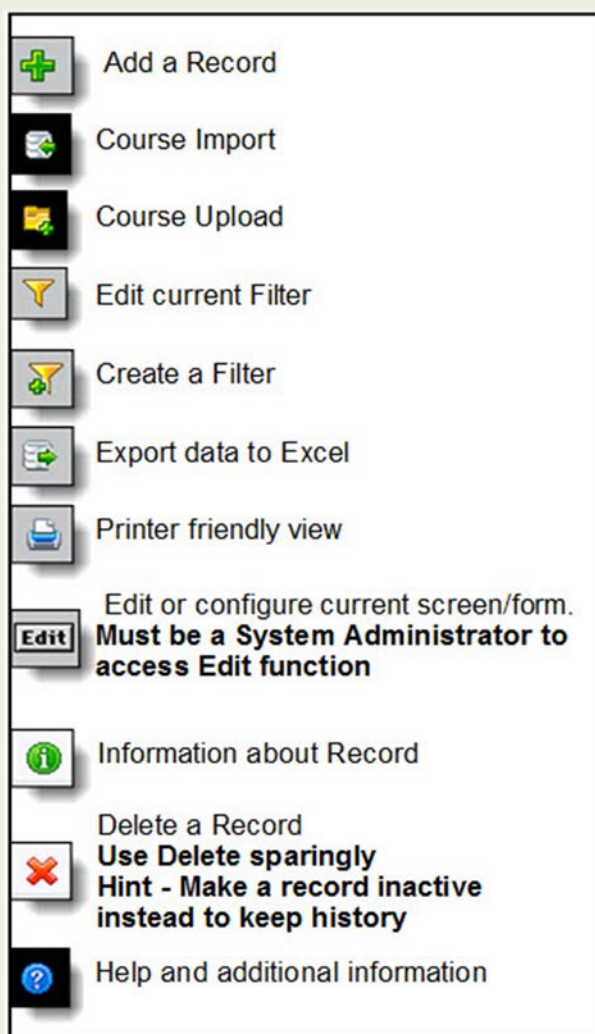
▶ Show SQL

There were no records retrieved in the query.

- **My Dashboard:** This link will navigate you back to the ETC home page.
- **My Transcript:** My Transcript: Lists all of the courses you have started, finished, cancelled, or courses that are In Progress.
- **My Enrollments:** Lists on-line courses you are currently enrolled in and instructor led courses you are signed up to attend.

➤	My Requirements: Includes all required courses based on individual position, company requirements, and compliance requirements.
➤	Course Catalog: Shows all of the courses that are offered through the Employee Training Center. All online classes are found and registered through this link.
➤	Search Course Catalog: This is a search feature that allows you to search for a class using the catalog or a keyword.
➤	Schedule: Opens a calendar of upcoming events. Hover over an event for description, location, etc.
➤	Contact Information: ETC Administrator Contact Information
➤	Logout: You can logout from two locations: My Menu, or click Logout in the upper right hand corner of the Dashboard. Failing to log out properly will temporarily disable you from logging into the Employee Training Center from another computer. If this occurs you will be timed out for about 20 minutes. After that time you should be able to log back into the Employee Training Center from any computer.

LearnerWeb Icons:



Requirements and Tips

Recommended Internet browsers for online courses:



Internet Explorer for PC



Safari for MAC

****Make sure all pop-up blockers are disabled (see instructions below)**

Disable Pop-up blockers

Internet Explorer 9 or higher:

- Go to Tools, Internet Options
- Privacy Tab
- Select or clear "Turn on Pop up Blocker" check box
- Click ok.

Internet Explorer 8 or below:

- Go to Tools
- Pop-up Blocker
- Turn off Pop-up blocker

Safari:

- From the Safari Menu make sure Block Pop-up window is unchecked

Running JavaScript

- Launch desired training course
- Launch page will open and should remain open through out the training.
- A java application window will appear
- Click Run.
- Click on Click Here to Launch the Course on the Launch Page. The training course should load and begin.

Updating JavaScript

- [Click Here to visit Java.com](#)
- Once you are on the website, click **"Free Java Download"**



- When this page appears, click **"Agree and Start Free Download"**



- Once you see this bar on the bottom of the screen, click **Run**



- When the "Welcome to Java" window appears, click **Install**



➤ Proceed to click Next to continue installing Java	
➤ Be sure to save any data and opened windows before closing them ➤ Click Ok when you are finished and to proceed installing Java	
➤ Java will begin to download	
➤ After Java has finished downloading, this window will pop up ➤ Click Close	

- When this page appears, click **"Verify Java Version"**



- A new browser window will open asking to run a **JAVA Detection**
- Press the **run** button to start the JAVA Detection



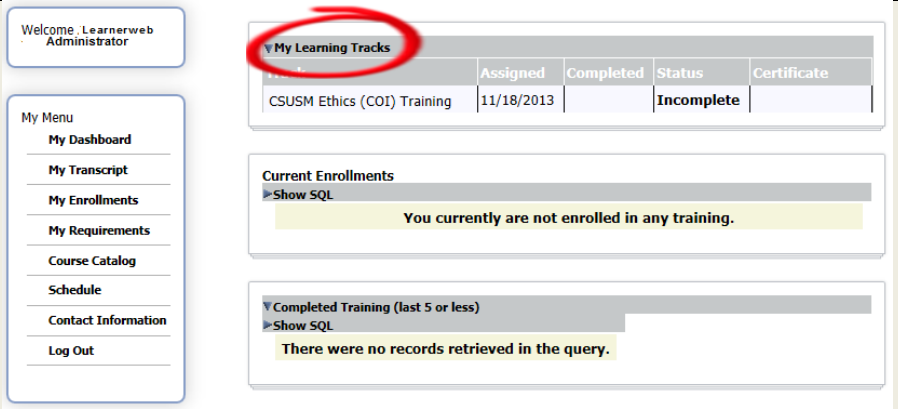
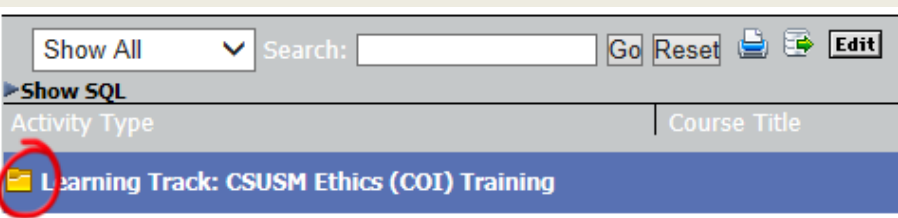
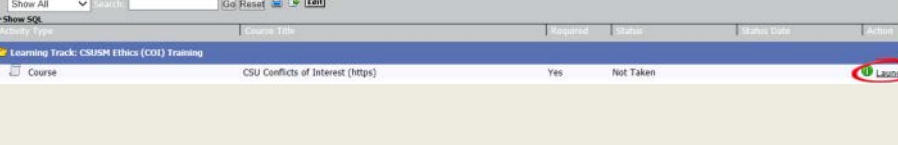
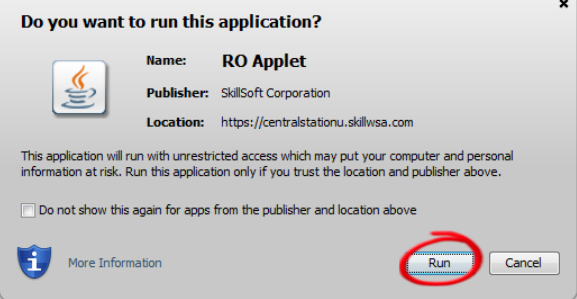
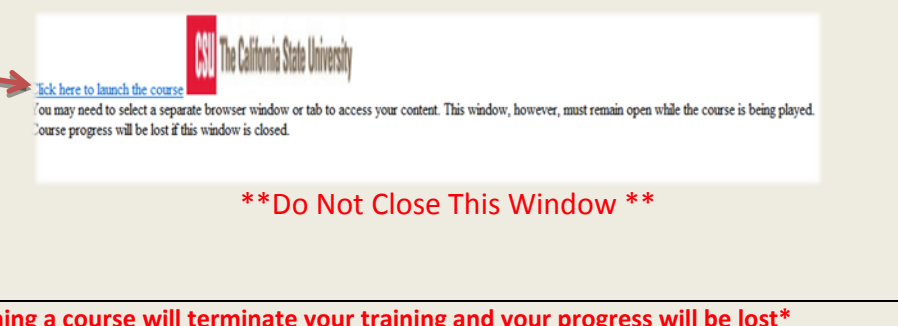
- After the verification process is over, and all other necessary actions are taken the course should **launch** successfully



How to Log In to ETC:

1. Please use one of the recommended internet browsers: ➤ PC use Internet Explorer ➤ Mac use Safari	
2. Go to the CSUSM Employee Training Center Webpage: http://csusm.edu/etc/ ➤ Click on "Portal Login"	
3. Use your Campus ID and Password to login	

How to launch a course from your Learning Track

1. "My Learning Tracks" can be located in the center plane of My Dashboard	
2. Learning Tracks that have been assigned to the learner will be found here.	
3. Click on the Track name to open your assigned Learning Track	
4. Click on the Yellow Folder Icon to open a catalog. You can see additional information about the course by clicking the title	
5. To start your training, select Launch under the action column. If JAVA window opens go to step 6, if not proceed to step 7.	
Please disable all Pop up blockers prior to launching a course	
6. A new window will open asking the learner to run a JAVA ROApplet ➤ Press the Run button to start the JAVA RO Applet.	
7. From here the learner will be able to launch their training. ➤ Press the Click Here to Launch the Course Link to begin your training. After the learner presses the link, the training window will pop up.	

*** Closing pop-up windows after launching a course will terminate your training and your progress will be lost***

Manager Menu:

Access levels such as: Managers, Manager/Trainer, Trainer, Trainer Assistant and Power Users and System Administrators will have access to these links.



California State University
SAN MARCOS

Welcome Learnerweb Administrator

My Menu

- My Dashboard
- My Transcript
- My Enrollments
- My Requirements
- Course Catalog
- Schedule
- Contact Information
- Log Out

Manager Menu

- People
- Manager To-Do List
- Reports
- Courses
- Master Schedule
- Catalog Manager
- Communication Manager
- Administration
- Configuration

My Learning Tracks

Track	Assigned	Completed	Status	Certificate
CSUSM Ethics (COI) Training	11/18/2013		Incomplete	

Current Enrollments

► Show SQL

Delivery	Course Title	Status	Status Date	Action	Cancel
On-Line courses	CSU Conflicts of Interest (https)	In Progress	02/10/2014	Launch	

► Completed Training (last 5 or less)

RESOURCES

For instructions to getting started, [click here](#)

For contact information please email [ETC](#) or call (760)750-4383

- **People:** This link will allow the manager to view all current Learner records. Managers will be able to add, delete, view history and edit Learner records.
- **Manager To-Do List:** List of any actions that the manager needs to complete
- **Reports:** Standard reports to make compiling and tracking information easier. These reports can be filtered and sorted to tailor for the results you need.
- **Courses:** Lists a variety of courses in your catalog. This allows you to create the training environment that best fits your needs to incorporate classroom or web based courses.
- **Master Schedule:** Most courses in the calendar are hyperlinked to the course description where a learner may have the option to register. If the course does not contain a hyperlink, enrollment is not permitted.
- **Catalog Manager:** Catalogs are groupings of courses, often grouped by topic or role.
- **Communication Manager:** This feature allows the manager to customize emails for their specific needs to keep learners, managers, and trainers informed and up to date with one time or scheduled communications.
- **Administration Menu:** Manager will be allowed to use administrator functions through Security Set Up, Utilities and Managers tabs.
- **Configuration Menu:** Through this link System Administrators will access to System Configuration, Menus and Reports, Enrollment and Approval Workflow, Catalog Course and Class Type and Other Type Managers tabs. *****LearnerWeb Administrator Only*****

How to Run a Report:

Manager Menu

- People
- Manager To-Do List
- Reports**
- Courses
- Master Schedule
- Catalog Manager
- Communication Manager
- Administration
- Configuration

➤ From Manager Menu

➤ Select **Reports**

Report Name	Category	Report Type	Option ID	Action
Training Tracking by Course	Course	Internal	TTC	
Not Taken Report	Course	Internal	NTR	
Expiring Training By Person	People	Internal	ETL	
Training Tracking by Person	People	Internal	TTL	
Learning Track Progress By Track then By Person	Tracks	Internal	LTT	
Learning Track Progress By Person then By Track	Tracks	Internal	LTL	
Required Training Not Taken By Track	Tracks	Internal	LTN	
Archived History Report	History	Internal	Archive	
Assessment Detail Report	Assessment	Internal	ADR	

Total Records: 9

➤ Click the **Eye Icon** to view the Report without filtering or editing or click the **Report Name** to view the available filtered reports or to edit a report.

➤ From here you can choose from a number of options including Select, Edit, Delete.

Action

☐ Select
☐ Edit
☐ Delete

Edit an Existing Report:

Edit Filter			
1. Column	2. Operator	3. Value(s)	
Course ID	Equal	-1	
Course Title	Equal	-1	
Department	Equal	Select Department Academic Senate AC DPRG Acad Programs Offi AC DPRG First Year Programs AC DRES Acad Resources Offi AC DRES Faculty Center Multiple: ☐	
Last Name	Equal		
LearnerID	Equal		
Learner Record Status	Equal	Select Learner Record Status Active Inactive Pending Multiple: ☐	
Title ID	Equal	Select Title ID Accountant I Accountant II Accountant III Accounting Technician II Accounting Technician III Multiple: ☐	

Sort By Fields

4. Data Item	5. Ascending		Descending
Select Data Item to Sort on	☒		☐

Output Style and Format

Specify the style in which you want the output:

Specify the format in which you want the output:

Confirm

If you want to save this filter, please enter a name to save it by. If you do not enter a name, the filter will be saved temporarily until you set up another filter for this view. If you do specify a name and a filter with that name for the current view already exists, it will be overwritten.

Specify if this filter is to be available to all users:

Name: QuickFilter Save Public Report

To add Filters:

1. Choose **Column** from drop down menu
2. Choose **Operator** from drop down menu
3. Choose **Value** from List
 - To select more than one value
 - Click **Multiple** and use:
 - CTRL+click to choose several values
 - SHIFT+click to choose group of values
 - Repeat this process to add additional filters

You can also Sort by Fields:

4. Choose **Data Item** from drop down menu to sort by
5. Click **Ascending** or **Descending**
 - Repeat this process to add additional sort fields

You can choose Output Style:

- Click **Report** to generate a report with headings, etc in LearnerWeb
- Click **Grid** to generate a report in a format to export to an excel spreadsheet
- Specify whom the report is available to by selecting from the drop down menu
- Name the report
 - Click **Save**

To Export the Report Data to Excel

- Click the **Output to Excel Icon**
- Open in Excel



Example on how to Run a Report:

We will show how to pull a report from the LearnerWeb system using HR-COI course as an example to find learners that have completed the course and learners that are incomplete.

Manager Menu

- People
- Manager To-Do List
- Reports**
- Courses
- Master Schedule
- Catalog Manager
- Communication Manager
- Administration
- Configuration

From the Manager Menu

➤ **Select Reports**

Report Name	Category	Report Type	Option ID	Action
Training Tracking by Course	Course	Internal	TTC	
Not Taken Report	Course	Internal	NTR	
Expiring Training By Person	People	Internal	ETL	
Training Tracking by Person	People	Internal	TTL	
Learning Track Progress By Track then By Person	Tracks	Internal	LTT	
Learning Track Progress by Person then By Track	Tracks	Internal	LTL	
Required Training Not Taken By Track	Tracks	Internal	LTN	
Archived History Report	History	Internal	Archive	
Assessment Detail Report	Assessment	Internal	ADR	

Total Records: 9

The following screen will provide the report names available in Learnerweb

➤ From this window select **Learning Track progress by Track then by Person**

Select the filter you want to use for this report, or [Show All](#) if you do not want to use a filter.

Owner	Filter Name	Style	Format	Action
000006835	COI-COMplete & IP	Grid	Learning Track Progress By Track then By Person	Show Filter Details ☐ Select ☐ Edit ☐ Delete
MAXIT	COI-COMplete & IP	Grid	Learning Track Progress By Track then By Person	Show Filter Details ☐ Select ☐ Edit ☐ Delete
000006835	HR-COI INC	Grid	Learning Track Progress By Track then By Person	Show Filter Details ☐ Select ☐ Edit ☐ Delete
MAXIT	HR-COI INC	Grid	Learning Track Progress By Track then By Person	Show Filter Details ☐ Select ☐ Edit ☐ Delete
000006835	HR-COI INCOMPLETE	Grid	Learning Track Progress By Track then By Person	Show Filter Details ☐ Select ☐ Edit ☐ Delete
MAXIT	HR-COI report	Grid	Learning Track Progress By Track then By Person	Show Filter Details ☐ Select ☐ Edit ☐ Delete
000006835	HR-SHP INC	Grid	Learning Track Progress By Track then By Person	Show Filter Details ☐ Select ☐ Edit ☐ Delete
MAXIT	HR-SHP INC	Grid	Learning Track Progress By Track then By Person	Show Filter Details ☐ Select ☐ Edit ☐ Delete
MAXIT	Radiation	Grid	Learning Track Progress By Track then By Person	Show Filter Details ☐ Select ☐ Edit ☐ Delete
000006835	SavedSearch	Report	Learning Track Progress By Track then By Person	Show Filter Details ☐ Select ☐ Edit ☐ Delete
MAXIT	SavedSearch	Grid	Learning Track Progress By Track then By Person	Show Filter Details ☐ Select ☐ Edit ☐ Delete
MAXIT	Status	Grid	Learning Track Progress By Track then By Person	Show Filter Details ☐ Select ☐ Edit ☐ Delete
MAXIT	TestSCH	Report	Learning Track Progress By Track then By Person	Show Filter Details ☐ Select ☐ Edit ☐ Delete

Add New Filter

The following screen shows previously created reports available to view, edit or delete.

**** Please do not edit or delete a report from a different Learner without their permission****

➤ For this example select **Add New Filter**

Add Filter

1. Column Catalog ID	2. Operator Equal	3. Value(s) HR-COI	Delete?
4. Column Completion Status ID	5. Operator Equal	7. Value(s) Complete Incomplete Not Applicable	6. Multiple ☒

Sort By Fields

8. Data Item Status Date	Select the data item(s) you want to sort by for this filter	Ascending ☒	Descending ☐
------------------------------------	---	--	--

Output Style and Format

Specify the style in which you want the output:
Specify the format in which you want the output:

9. **Report** ☐ **Grid** ☒ Learning Track Progress By Track then By Person

Confirm

If you want to save this filter, please enter a name to save it by. If you do not enter a name, the filter will be saved temporarily until you set up another filter for this view. If you do specify a name and a filter with that name for the current view already exists, it will be overwritten.

Specify if this filter is to be available to all users:

11. Name: HR-COI ☒ Save

10. **Me Only** ☐

1. From the **Column Section** choose the drop down menu and select: **Catalog ID**
2. From the **Operator Section** choose the drop down menu and select: **Equal**
3. From the **Value(s) menu** enter the **course ID**. (For this example we will use HR-COI)
4. From the **Column Section** choose the drop down menu and select: **Completion Status ID**
5. From the **Operator Section** from the drop down menu and select: **Equal**
6. Then check the box titled **Multi**
7. From the **Value(s) menu** Select **Complete** and **Incomplete** by holding **Ctrl** button down on the keyboard click both **Complete** and **Incomplete**
8. From the **Sort by Fields Section**, In the **Data Item** pull down menu, select: **Status Date**
9. From the **Output Style and Format Section**, you have option to choose a **Report** or **Grid** style report.
 - Click **Report** to generate a report with LearnerWeb headings
 - Click **Grid** to generate a report that can be exported into Excel

For this example select **Grid** to view in Excel
10. Choose to have your report available to all learners in the system or to only specific learners
11. Your next step will be to name the report and select **Save**

HR-COI report

Show Filter Show SQL

LearnerID	Learner Name	Course Title	Required	Status Date	Status
110100001	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100002	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100003	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100004	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100005	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100006	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100007	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100008	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100009	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100010	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100011	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100012	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100013	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100014	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100015	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100016	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100017	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100018	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100019	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100020	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100021	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100022	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100023	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100024	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100025	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100026	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100027	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100028	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100029	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken
110100030	Alfonso, Antonio	CSU Conflicts of Interest (https)	Yes		Not Taken

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 Next >> [List All]

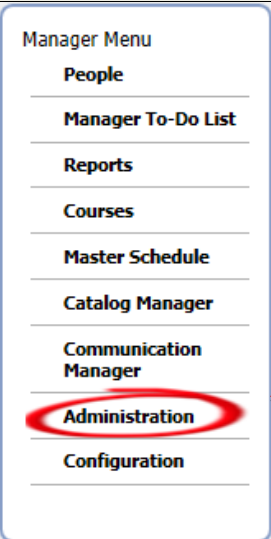
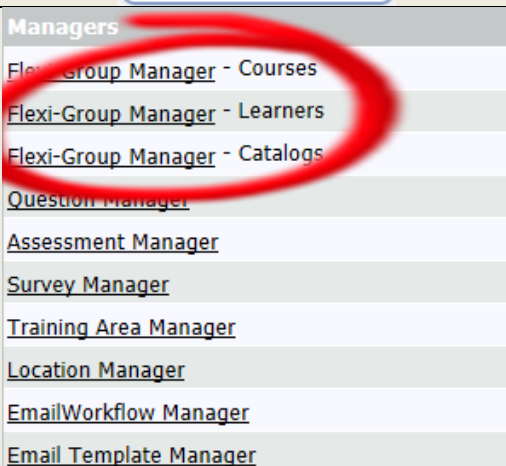
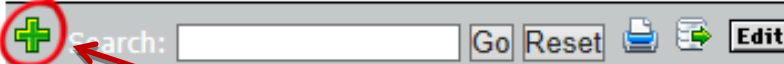
Total Records: 302

*Note: The blacked out portion of the image above is to protect learner information.

A new report will be created

- Click on the **Excel Icon**, to open in Excel

Create a Flexi-Group:

 Manager Menu - People - Manager To-Do List - Reports - Courses - Master Schedule - Catalog Manager - Communication Manager Administration - Configuration	➤ From the Manager Menu ➤ Select Administration								
 Managers Flexi-Group Manager - Courses Flexi-Group Manager - Learners Flexi-Group Manager - Catalogs - Question Manager - Assessment Manager - Survey Manager - Training Area Manager - Location Manager - EmailWorkflow Manager - Email Template Manager	Choose the type of Flexi-group you want to work with. ➤ Course ➤ Learner ➤ Catalog								
 Search: Go Reset Edit ➤ Show SQL Display Sequence Flexi-Group Name									
➤ Click the Green Plus Icon  to open the Add a Flexi-group Wizard.									
Flexi-Group Add Wizard - Learners Step 1 The first step is to select one or more Learners. Use the filter(s) below to build a list of possible Learners to include and then click the Next button. To include all Learners just click the Next button without specifying any filter(s). FlexiGroupAdd_Learner/Step1 *Domain Key None selected ▼ <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">1. Data Item</th> <th style="width: 20%;">2. Operator</th> <th style="width: 20%;">3. Value(s)</th> <th style="width: 30%;">4. Multi? </th> </tr> </thead> <tbody> <tr> <td> Department Select Column to filter on </td> <td> Equal </td> <td> Any </td> <td> ☐ ☐ </td> </tr> </tbody> </table> Reset Next		1. Data Item	2. Operator	3. Value(s)	4. Multi?	Department Select Column to filter on	Equal	Any	☐ ☐
1. Data Item	2. Operator	3. Value(s)	4. Multi?						
Department Select Column to filter on	Equal	Any	☐ ☐						
1. Choose the parameter to filter from the Data Item drop down menu. 2. Choose the Operator from the drop down menu. 3. Choose the specific Value from the drop down menu. 4. Click Multi to choose more than one value for that parameter. ➤ Add another filter or Click Next.									

Flexi-Group Add Wizard - Learners Step 2

Here is the complete list of the selection filters that you have entered so far.

Click the **Next** Button to choose a name for the Flexi-Group or click the **Back** button to add more filters.

Flex

☐ Enter more selection Filters

☒ Name and Create this Flexi-Group

➤ Click **Name and Create this Flexi-group**

➤ Click **Next**

Flexi-Group Add Wizard - Learners Step 3

Enter a name for this new set of Filters - this will enable you to refer to it when you want to use these filters.

Click the **Next** button to add the new FlexiGroup to the database.

FlexiGrou

*Domain Key LearnerWeb Base Domain ▼

*Flex-Group Name Test Administrative

Reset

Next

➤ Choose **Domain Key** from the drop down menu

➤ Name the Flexi-group

➤ Click **Next**

Flexi-Group Add Wizard - Learners Step 4

The new Flexi-Group has now been created

Select an option from the list below and then click the **Next** button to continue.

☒ Test the new Flexi-Group

☐ Exit to Flexi-Group Manager

Reset

Next

➤ Choose **Test the Flexi-group**

➤ Click **Next**

Creating a Learning Track:

Manager Menu

People

Manager To-Do List

Reports

Courses

Master Schedule

Catalog Manager

Communication Manager

Administration

Configuration

➤ From the Manager Menu

➤ Select **Catalog Manager**

 Search:

- Click the **Green plus sign**  to open the Add a Catalog Wizard

Add Catalog Wizard

LearnerWeb allows you to maintain several kinds of Catalogs.

A Learning Track catalog.

A Course Catalog.

A Qualifying Courses Catalog.

A Certification Catalog.

Select the desired option below and click the **Next** button to continue in the wizard.

☐ Course Catalog

☒ **Learning Track**

- Click **Learning Track**
- Click **Next**

***Catalog ID

***Catalog Type ID **Learning Track**

Domain Key **None selected**

***Permanent Assignment? ☒ No ☐ Yes

Number Related

Effective From

Apply Effective Dates ☒ No ☐ Yes

Other Information

0 characters typed so far out of 1024 maximum

***Catalog Name

***Status **Active**

Training Area Key **None selected**

Creator **None selected**

Number of Credits

Effective To

Follow-on Track **None selected**

- Items with an * are required

For a Catalog or Learner Track, required items include:

1. Catalog ID – Alpha numeric
2. Catalog Name – Alpha numeric
3. Catalog Type – Confirm this is a Learning Track
4. Status – Choose **Active**, **Inactive**, or **Pending** from the drop down menu. * Default is Active
5. Permanent Assignment – click **Yes** or **No**. *Default is No

Items that are not required include

- Training Area – Choose from drop down menu
- Number of Credits – Can be left blank
- Effective from Date
- Effective to Date

Catalog ID Test Track 1.	Catalog Name Test Track 2.
Catalog Type ID Learning Track 3	*Status Active 4.
Domain Key None selected	Training Area None selected
Permanent Assignment? ☒ No ☐ Yes 5.	Creator None selected
Number Related	Number of Credits
Effective From	Effective To
Apply Effective Dates ☒ No ☐ Yes	Follow-on Track None selected
Other Information This is a test. This is only a test.	
36 characters typed so far out of 1024 maximum	
Save and Close Window Save and Add Another Reset Cancel	

- Click **Save and Close Window**

Add Course(s) to Learning Track:

Manager Menu

- People
- Manager To-Do List
- Reports
- Courses
- Master Schedule
- Catalog Manager**
- Communication Manager
- Administration
- Configuration

➤ From the Manager Menu

➤ Select **Catalog Manager**

➤ Find the Learner Track to add to the course to

Catalog ID	Catalog Name	Catalog Type Name	Status	Action
_Testing	Testing All courses	Course Catalog	Active	
FS	Food Safety	Course Catalog	Active	
LearnerWeb	All Courses	Course Catalog	Active	
SkillSoft	SkillSoft Library	Course Catalog	Active	
Test	Test Catalog	Course Catalog	Active	

➤ Click the **Green Info Icon** in the action column

Properties **Courses** People Assignment Criteria Group Documents

Search: Go Reset Edit

➤ Click on the **Courses Tab**

➤ Then click on the **Green Plus Icon** to open the wizard

Add a Catalog/Track Activity Wizard - Step 1

Select an Activity Type from the list below and then click **Next** to continue.

GroupActivityAdd/Step1

Group Activity Type ID

☐ Catalog/Learning Track
☐ Competency
☒ **Course**
☐ Other Activity

➤ Choose **Course**

➤ Click **Next**

Add a Course to a Course Catalog - Step 2

This wizard walks you through the steps of adding a new Course to the Catalog.

The first step is to select the Course to add.

You can enter a partial value and all matches will be returned. To list all Courses, click the **Next** button.

GroupActivity

Course ID

Course Title

Course Type Delivery

Category Subcategory

- Click **Next** (for all choices) , or enter the **Course ID** if you know it

Add a Course to a Course Catalog - Step 3

Here is a list of all Courses that match your selection criteria.

If you want to re-define your filters then click the **Back** button.

You must select one or more Courses from this list. Select individual Courses by using Ctrl/Click.

You can choose a range of Courses by clicking on the first Course in the range and then Shift/Clicking on the last.

Click the **Next** button to continue.

GroupActivity_CC_

Courses

(esh_sah_b32_sh_enus) "Slips, Trips, and Falls"	^
(esh_sah_b02_sh_enus) "Spill Prevention, Control, and Countermeasure Pla	
(esh_sah_a61_sh_enus) "Welding, Cutting, and Brazing"	
(SAH0485) "Welding, Cutting, and Brazing"	
(esh_sah_a35_sh_enus) Access to Employee Medical and Exposure Records	
(esh_sah_a62_sh_enus) Accident Investigation and Reporting	
(SAH0402) Accident Investigation and Reporting	
(SAH0400) Accident Investigation and Reporting Simulation	
(esh_sah_b52_sh_enus) Accident Procedures Involving Large Vehicles	
(esh_sah_b48_sh_enus) Ammonia Safety	v

☐ Select All

- Click the **Course** you want to add to this Learning Track
- Click **Next**
 - Hold down the CTRL key and click to choose individual courses. Hold down the SHIFT key and click to choose a range of courses

Edit

Add a Course to a Learning Track - Step 4

GroupActivity_COURSE/Step4

Courses • (HR-SEXHRSMT) Sexual Harrassment

Required ☒ No ☐ Yes

Days Due From Assignment

Date Due 

Enrollment Rule ▼

Credit Amount

Update Level ▼

- Choose to make the courses **Required** or not
 - You can make the Learning Track not required and go into the Learning Track list of courses to make specific courses required
- Choose a **Due Date**
 - Fill in the number of days or
 - Choose a due date
 - Leave blank if you do not want to set a due date
- Click **Next**

Edit

Add a Course to a Learning Track - Step 10

GroupActivity_COURSE/Step10

☐ Send e-mail notifications to assigned learners

☒ Exit wizard without sending e-mail notifications

- Choose whether or not to send e-mail notifications. Default should be to **"Exit wizard without sending e-mail notifications"**
 - When in test mode, click Exit Wizard Without... (you do not want to fill e-mail boxes with unnecessary e-mails)
- Click **Close Window**

Add Learners to a Learning Track Automatically Using Flexi-Groups:

Manager Menu

- People
- Manager To-Do List
- Reports
- Courses
- Master Schedule
- Catalog Manager**
- Communication Manager
- Administration
- Configuration

➤ From the Manager Menu

➤ Select **Catalog Manager**

➤ Choose the Learning Track you want to assign and click the **Green Circle Icon** ⓘ

Catalog ID	Catalog Name	Catalog Type Name	Status	Action
_Testing	Testing All courses	Course Catalog	Active	ⓘ ✖
FS	Food Safety	Course Catalog	Active	ⓘ ✖
LearnerWeb	All Courses	Course Catalog	Active	ⓘ ✖

➤ Click the **Assignment Criteria** tab to assign Flexi-group

➤ Click the **Green Plus Icon** +

Properties Courses People **Assignment Criteria** Group Documents

+ Search: [] Go Reset [] [] Edit

Show SQL

Flexi-Group Type Name	Flexi-Group Name
Learners	All Users

Total Records: 1

Catalog Assignment Criteria

The first step is to select one or more Learners.

Use the filter(s) below to build a list of possible Learners to include and then click the **Next** button.

To include all Learners just click the **Next** button without specifying any filter(s).

Flexi-Group ID Make a selection []

Reset Next

➤ Choose the **Flexi-group(s)** you wish to add

➤ Click **Next**

Catalog Assignment Criteria

The new permissions have now been applied this catalog

Select an option from the list below and then click the **Next** button to continue.

GroupPermissionAdd/Step5

Reset Close Window

➤ Click **Close Window**

Properties Courses People **Assignment Criteria** Group Approvers Qualifying Catalog Group Completion Criteria Group Documents

+ Search: [] Go Reset [] [] Edit

Show SQL

Flexi-Group Type Name	Flexi-Group Name	Status
Learners	AA Demo Group	Active ⓘ ✖

➤ The Flexi-group is now assigned to that Learning Track

➤ Click the **Wand Icon** ⚡ to execute assignment, or the changes you made will not take affect

Add Learners to a Learning Track Manually:

Manager Menu

- People
- Manager To-Do List
- Reports
- Courses
- Master Schedule
- Catalog Manager**
- Communication Manager
- Administration
- Configuration

➤ From the Manager Menu

➤ Select **Catalog Manager**

California State University
SAN MARCOS

Catalog Manager

Welcome

My Menu

- My Dashboard
- My Transcript
- My Enrollments
- My Requirements
- Course Catalog
- Schedule
- Contact Information
- Log Out

Search: [] [Go] [Reset] [Edit]

Catalog ID	Catalog Name	Catalog Type Name	Status	Action
_Testing	Testing All courses	Course Catalog	Active	[i] [x]
PS	Food Safety	Course Catalog	Active	[i] [x]
LearnerWeb	All Courses	Course Catalog	Active	[i] [x]
SkillSoft	SkillSoft Library	Course Catalog	Active	[i] [x]
Test	Test Catalog	Course Catalog	Active	[i] [x]
CUSTOM	Test Custom Learning Track	Learning Track	Active	[i] [x]
TNA	Training Needs Assessment Track	Learning Track	Active	[i] [x]
AM	Auto Mechanic	Learning Track	Active	[i] [x]
BSE	Building Safety Engineer	Learning Track	Active	[i] [x]
Carpenter	Carpenter	Learning Track	Active	[i] [x]
CSU_DEFDRV	CSU Defensive Driving	Learning Track	Active	[i] [x]
CSUSH_DEFDRV	San Marcos Defensive Driving	Learning Track	Active	[i] [x]

➤ Choose the **Learning Track**

➤ Click the **Green Circle Icon** [i] to select the Learning Track you wish to modify

Properties | **Courses** | **People** | **Assignment Criteria** | **Group Documents**

[+] [] [] Search: [] [View People assigned to this track] [Go] [Reset] [Edit]

Show SQL

LearnerID	Learner Name	Title Name
-----------	--------------	------------

➤ Click the **People Tab** to manually assign learners.

➤ Click the **Green Plus Icon** [+] to assign people to Learning Track

Edit

Assign Learners to Catalog Wizard - Step 1

Below is a list of fields that are searchable. Select the desired options below to build a list of possible people you want to select. To list all people in your group or skip this step entirely, click the Next button. You can always change your mind before updating the database.

GroupLearnerAdd/Step1

LearnerID Last Name

Title ID User 1

Department Location

Company

- This window allows you to narrow the choices of people to add. You can type in an individual's LearnerID or Last Name. You can also search by partial LearnerID or Last Name (For example, you can enter "Smi" and the system will return all Last Names that contain "Smi". If you want all learners in the system, leave the Last Name box empty.
- Search for any Learner using the criterion above to assign them to the learning track
- Click **Next**

Assign Learners to Catalog Wizard - Step 2

From the list of people, click on the person or hold the CTRL key to click on multiple people. Click Next to continue or skip this step. Use the Back button on your browser to refine your search.

GroupLearnerAdd/St

Learners

Aaron, ☒

Aaron, ☒

Aaronson, ☒

Aasegaard, ☐

Aasted, ☐

Abad, ☐

Abajian, ☐

Abalos, ☐

Abanes, ☐

Abarca, ☐

☐ Select All

5000 Learners in this list

- You can choose Multiple Learners
 - Hold CTRL + Shift and click first and last Learner for blocks of Learners
 - Hold CTRL and click specific Learners
 - Click **Select All** box to select all Learners listed
- Click **Next**

Edit

Assign Learners to Catalog Wizard - Step 3

Below is a list of the people you selected.

If you have more people to add, select the Add More People option. If you are ready to update the Learning Track with the people you selected, click on the Update Learning Track Option

Click Next to Continue.

GroupLearnerAdd/Step3

Learners

- Aaron,
- Aaron,
- Aaronson,

☐ Add More People
 ☒ Update Learning Track

- If you need to add additional Learners, click **Add More People**
- Otherwise, click **Update Learning Track**
- Click **Next**, to update the Learning Track

Assign Learners to Catalog Wizard - Step 4

Below is a list of the people you selected and additional information needed to complete your learning track assignment.

Please enter the date of the learning track assignment.

LearnerWeb will automatically calculate when items in the training will be due based on parameters defined for courses in the track.

To UPDATE the database with your selection click the Next button. Use the Back button to return to previous screens to make any needed changes.

GroupLearnerAdd,

Learners

- Aaron,
- Aaron,
- Aaronson,

Date Assigned 

☒ Send e-mail notifications to assigned learners
 ☐ Do not send e-mail notifications to assigned learners

- From this window, you will have the option to use the default due date, which is the date the track was created, or you can click the calendar icon to select a new due date.
- Select **"Do not send e-mail..."** this feature is still under development
- Click **Next**

Edit

Assign Learners to Catalog Wizard - Step 5

The wizard has successfully updated the database.

3 people were added and 0

GroupLearnerAdd/Step5

- This screen will show how many learners have been added successfully added to the learning track
- Click **Next**

Removing a Learning Track from a Learner:

Manager Menu

- People
- Manager To-Do List
- Reports
- Courses
- Master Schedule
- Catalog Manager**
- Communication Manager
- Administration
- Configuration

- From the Manager Menu
- Select **Catalog Manager**

Search: Go Reset Edit

➤ Show SQL

Domain Name	Display Sequence	Catalog ID	Catalog Name	Version	Catalog Type Name	Status	Action
		LEAD_GROUNDWORKER	LEAD GROUNDWORKER		Learning Track	Active	
		OE	Operating Engineering		Learning Track	Active	
		Painter	Painter		Learning Track	Active	
		Pest_Control_and_Spray_Specialist	Pest Control and Spray Specialist		Learning Track	Active	
		PJ	Plumber Apprentice		Learning Track	Active	
		Plumber	Plumber		Learning Track	Active	
		RMS-RAD-ON	Radiation Safety		Learning Track	Active	
		SAF-CSUSMSAFETY	CSUSM General Safety Courses		Learning Track	Active	
		Supervisory_Personnel	Supervisory Personnel		Learning Track	Active	
		TestTraining	Test Training		Learning Track	Active	
		Tree_Trimmer_I	Tree Trimmer I		Learning Track	Active	
		Tree_Trimmer_II	Tree Trimmer II		Learning Track	Active	

<< Prev 1 2 [List All]

- Your Catalog Manager will display all current Learning Tracks available in your LMS Catalog
- Select the Learning Track you plan to change

Catalog ID **HR-COI** Catalog Name **CSUSM Ethics (COI) Training**

Catalog Type Name **Learning Track**

Properties Courses **People** Assignment Criteria Group Approvers Qualifying Catalog Group Completion Criteria Group Documents

Search: Go Reset Edit

➤ Show SQL

LearnerID	Learner Name	Title Name	Department	Completion Status Name	Auto-Assigned	Action
001183998	Lawson, Rachel			Incomplete	No	

Total Records: 1

- Enter the name of the learner in the search bar that you wish to remove from the learning track
- Click the red "X" located under the action column

Remove a Learner from a Catalog

You are making a request to delete the person from the group.

Deleting the record will permanently remove the record from the database and can not be recovered.

To confirm your DELETE request, please click the **Delete** button.

If you do not want to delete the record, please click the **Cancel** button.

- Verify that the information located on the Remove a Learner from a Catalog screen is correct.
- Click **Delete** to complete this action

Removing Course from Learner:

Manager Menu

People

Manager To-Do List

Reports

Courses

Master Schedule

Catalog Manager

Communication Manager

Administration

Configuration

➤ From the Manager Menu

➤ Select **People**

+

🔍

🔍

🔍

Show All

Search:

Go

Reset

🖨

📧

Edit

➤ Enter the name of the learner in the search bar

➤ Select the learner profile that needs to be modified

Properties

History

Learning Tracks

People Audit

People Documents

Direct Reports

Search:

Go

Reset

🖨

📧

Edit

➤ Show SQL

Learner Name	LearnerID	Title	Record Status	UserName
History Listing for: Arlene Varjabedian				
Year Ending: 12/31/2014				
_aicc_spcentralsta_coihttps	CSU Conflicts of Interest (https)	In Progress	02/10/2014	📄 ✖
Total Records: 1				

➤ Locate the course that needs to be removed from the learner profile

➤ Click the red "X" under the action column

Delete a History record for a Learner

You are making a request to delete this history record from the Learners transcript:

• Learner ID: **User ID**

• Learner Name: **User Name**

• Course ID: **_aicc_spcentralsta_coihttps**

• Course Title: **CSU Conflicts of Interest (https)**

• Status Date: **11/26/2013**

Deleting the record will permanently remove the record from the database and can not be recovered.

To confirm your DELETE request, please click the **Delete** button.

If you do not want to delete the record, please click the **Cancel** button.

Delete

Cancel

➤ Verify that all the information on the Delete a History record for a Learner screen is correct

➤ Click **Delete** to complete the action

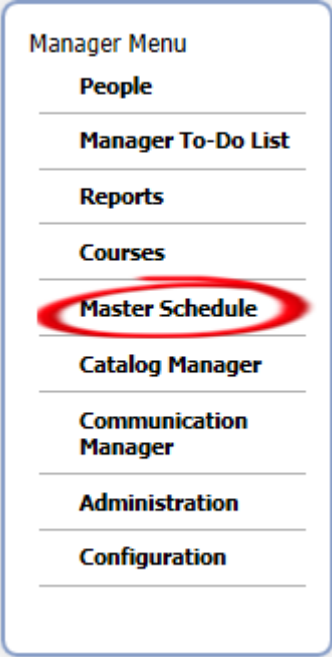
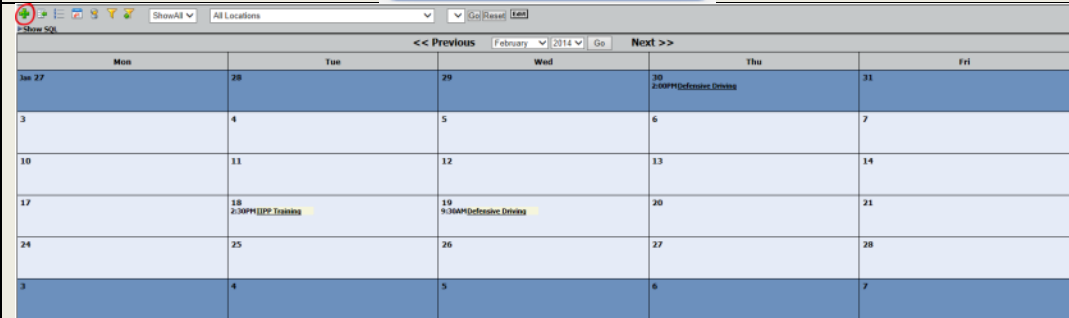
Page 29 of 32

Master Schedule:

Most courses in the calendar are hyperlinked to the course description where a learner may have the option to register. If the course does not contain a hyperlink, enrollment is not permitted.

1 2 3 All Locations All Training Areas Search: Go Reset Edit				
Show SQL << Previous November 2013 Go Next >>				
Mon	Tue	Wed	Thu	Fri
Oct 28	29	30	31	1
4	5	6	7	8
11	12	13	14	15
18	19	20	21	22
25	26	27	28	29
2	3	4	5	6

Use the Master Schedule to add courses to the calendar:

 Manager Menu - People - Manager To-Do List - Reports - Courses Master Schedule - Catalog Manager - Communication Manager - Administration - Configuration	➤ From the Manager Menu ➤ Select Master Schedule
 Calendar view showing dates from Jan 27 to Feb 7. A green plus icon is visible in the top left corner of the calendar grid.	➤ Click the Green Plus Icon + to open the Add Class Wizard at the top left of the calendar
Add Class Wizard LearnerWeb allows you to enter several kinds of events into your Master Schedule. Select the desired option below and click the Next button to continue in the wizard. ☒ Training Event ☐ Calendar Event Reset Next	➤ Select Training Event to add a Course ➤ Click Next
Add Training Event Wizard This wizard walks you through the steps of adding a new training event to the calendar. The first step is to select the course upon which the class will be based. You can enter a partial value and all matches will be returned. To list all courses, click the Next button. Course ID Course Title Course Type Any Delivery Any Category Any Subcategory Any Flexi-Groups None selected Reset Next	➤ Add Scheduled Event Wizard will allow the learner to enter the Course Id or Course Title to select the course that need to be scheduled. ➤ Click Next

Add Training Event Wizard

There were 1 matches found. Select a course and click next to continue. You can only select a single course for the event.

1. *Courses (SAF-DEFNDRIV) Defensive Driving ▼

*Start Date 12/05/2013 2. 

3. Start Time

4. Time Zone Pacific Standard ▼

5. *Delivery Select one ▼

*Location Select one ▼

6. Show In StoreFront ☒ No ☐ Yes

7. Trainers
None selected
Bradley, Bruce
Frasca, Regina
Garcia, Humberto

8. Venue None selected ▼

Version

8. Directions

0 characters typed so far

<< Back Reset Next 9.

1. Select the **Course** you wish to schedule
2. Choose the **Start Date** by clicking the Calendar Icon 
3. Enter a **Start time**(with am or pm)
4. Choose **Time Zone**
5. Choose **Delivery** (Instructor Led, Webinar, etc)
6. Choose **Location**
7. You have the option to select **Trainers**
8. Select **Venue** and add **Directions** if needed
9. Click **Next**

Add Training Event Wizard

The Class has now been added to the database with a temporary status.

At this point you may choose to save the Class to the Master Schedule and exit the wizard.

Or you may choose to save the class and proceed to the Class Enrollment wizard.

Finally, you may choose to exit the wizard without saving the class that you just created.

Please make your choice and then click the **Next** button to continue.

- ☒ Save the class and exit the wizard
- Next Action ☐ Save the class and jump to the Class Enrollment wizard
- ☐ Save the class and jump to the Marketing Email wizard
- ☐ Exit the wizard without saving the class

Reset Next

- After your course information has been entered the final screen will prompt the learner to **Save the class and exit the wizard**.
- Click **Next**